COUNTRY SNAPSHOT

Population\(^1\): 13,975,834
  Urban: 6,107,439 (44%)
  Rural: 7,868,395 (56%)

Rice Availability\(^2\) (g/c/d): 144
  Urban: 401
  Rural: 255

Rice market: Preference for 100% broken white rice

Production\(^3\): USDA, 2016 680,000 MT
                       FAO, 2013 291,000 MT

Domestic industrial rice milling: 15-20 mills, estimated up to 40% domestic rice milled industrially

Regional trade: Senegal is an entry point for imported rice to Mali. It is unclear how much could be considered unofficial imports. When duties in imported rice were high, rice was smuggled into Senegal from Gambia.

Sources: \(^1\)CIA Factbook 2015; \(^2\)Overall estimate is FAO 2013; Urban/rural availability is FFI estimate using USDA import/production data since domestic production has changed rapidly since 2013. Estimates assume 80% of imported rice and no domestically grown rice; rural population consumes the remainder; \(^3\)UN Comtrade 2014. *Abbreviations: g/c/d = grams per capita per day; MT = metric ton; USDA = United States Department of Agriculture; UNC = UN Comtrade; FAO = Food and Agriculture Organization*

IMPORTS

Number of importers: Approximately 11 importers; three companies have about 75% combined market share.

Mode of imports:
100% broken rice arrives as bulk shipments; rice from India is usually via containers.

Total imports:

<table>
<thead>
<tr>
<th>Source</th>
<th>Year</th>
<th>MT</th>
</tr>
</thead>
<tbody>
<tr>
<td>USDA, 2016</td>
<td></td>
<td>950,000</td>
</tr>
<tr>
<td>UNC, 2014</td>
<td></td>
<td>1,111,357</td>
</tr>
<tr>
<td>FAO, 2013</td>
<td></td>
<td>1,120,000</td>
</tr>
</tbody>
</table>

Type & Origins\(^3\)

<table>
<thead>
<tr>
<th>Type</th>
<th>MT (% of imports)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown rice</td>
<td>0.072 (0%)</td>
</tr>
<tr>
<td>Paddy rice</td>
<td>331 (0%)</td>
</tr>
<tr>
<td>Semi/wholly milled rice</td>
<td>4,865 (0.44%)</td>
</tr>
<tr>
<td>Broken rice</td>
<td>244,687 (98%)</td>
</tr>
<tr>
<td>India</td>
<td>684,601 (61.9%)</td>
</tr>
<tr>
<td>Thailand</td>
<td>236,823 (21.4%)</td>
</tr>
<tr>
<td>Brazil</td>
<td>50,082 (4.5%)</td>
</tr>
<tr>
<td>Antigua &amp; Barbuda</td>
<td>48,931 (4.4%)</td>
</tr>
<tr>
<td>Argentina</td>
<td>20,426 (1.9%)</td>
</tr>
<tr>
<td>USA</td>
<td>18,445 (1.7%)</td>
</tr>
<tr>
<td>Uruguay</td>
<td>14,422 (1.3%)</td>
</tr>
<tr>
<td>Pakistan</td>
<td>11,150 (1.0%)</td>
</tr>
</tbody>
</table>

Rice Availability:

<table>
<thead>
<tr>
<th>Type</th>
<th>MT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broken rice</td>
<td>781</td>
</tr>
</tbody>
</table>

Rice Availability:

- Urban: 401
- Rural: 255

Imported rice arriving in Dakar, Senegal. Photo: Jelle Goosens/Flickr
REPUBLIC OF SENEGAL

EXECUTIVE SUMMARY
Rice is the most important cereal in the Senegalese diet with roughly twice the average intake of either wheat or millet. While imports have remained flat or declined, rice production has increased over 100%, from 320,000 in 2012 to 680,000 in 2016. However domestic rice is still less than half of total rice availability.

Imported rice makes up 80% of urban rice consumption but domestic rice is rapidly gaining market share thanks to greater availability, lower cost, and improving quality. A large number of modern mills have been built in recent years in the Senegal River Valley, with the largest mill capable of processing 260,000 MT of paddy rice per year. Up to 40% of domestically grown rice is now milled industrially.

Fortification of imported rice is likely to be feasible, with three large companies comprising approximately 75% of the import market. The urban population primarily consuming imported rice would be the main beneficiaries, with some consumption in rural areas that do not produce rice. With the rapid increases in industrial milling of locally grown rice, fortification of the domestic supply may be feasible in the near future.

Table 1: Demographics and annual rice availability (milled equivalent)

<table>
<thead>
<tr>
<th>Population</th>
<th>Urban</th>
<th>Availability</th>
<th>Imports</th>
<th>Exports</th>
<th>G/c/d</th>
<th>Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.0 million</td>
<td>44%</td>
<td>1.022</td>
<td>0.950</td>
<td>0.010</td>
<td>144</td>
<td>0.680</td>
</tr>
</tbody>
</table>

2011-2016 trend

| | +2.5%/year | +3.6% | +4.8 | -3.0 | +10% | -- | +22% |

G/c/d: grams per capita per day; MMT, million metric tons
1 CIA Factbook
2 FAO Food Balance Sheets, 2013
3 USDA, 2016

GRAIN CONSUMPTION AND FORTIFICATION STATUS
Average per daily capita consumption of rice is estimated at 144 grams, the highest consumed grain in Senegal compared to wheat, maize, sorghum, and millet. Since 2003 average per capita availability of wheat and maize have stayed similar or slightly increased and rice has fallen 50 grams. Millet and sorghum have fallen (88 g/c/d to 59 g/c/d and 39 g/c/d to 21 g/c/d respectively) (Table 2). Availability of starchy roots has also fallen slightly (55 g/c/d to 32 g/c/d).

Table 2: Cereal grain consumption/availability and fortification status

<table>
<thead>
<tr>
<th></th>
<th>FAO 2003 g/c/d</th>
<th>FAO 2013 g/c/d</th>
<th>Mandatory</th>
<th>% Industrially milled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat</td>
<td>77</td>
<td>68</td>
<td>Yes</td>
<td>100%</td>
</tr>
<tr>
<td>Maize</td>
<td>34</td>
<td>51</td>
<td>No</td>
<td>Unknown</td>
</tr>
<tr>
<td>Rice</td>
<td>198</td>
<td>144</td>
<td>No</td>
<td>~40%</td>
</tr>
</tbody>
</table>

G/c/d: grams per capita per day
1 FAO Food Balance Sheets
2 FFI Database
Urban
Senegal’s population is 44% urban. With about 3 million people, the metropolitan region of the capital of Dakar comprises about half of the urban population. Residents have traditionally consumed imported rice only; however with domestic rice surpluses coming from the north, inroads are being made in the urban diet. If 80% of imported rice and 20% local rice is consumed by urban area, average urban availability could be 401 g/c/d.

Rural
Both domestic and imported rice is consumed in the countryside. Approximately 30% of domestically grown rice is self-consumed, the remainder is commercial surplus for non-productive areas (both urban and rural) of Senegal. Up to 20% of imported rice may be consumed by the rural population. If estimating that the entirety of domestically grown rice and 20% of imported is consumed in the rural areas, then consumption could be 180-256 g/c/d, with about 25% of that sum coming from imported rice.

A large minority of the rural population are rice farmers. In many village households millet is primarily consumed and rice purchased when needed.

Rice varieties and quality
Senegalese consume white rice. There is no importation of parboiled rice, consistent with other Francophone countries of West Africa, except Guinea.

The majority of Senegalese prefer broken rice thanks to a number of national dishes that require brokens. The market for white milled rice with 50% broken kernels or less is limited to about 30%. UN Comtrade data indicates that 99% of the imported rice in 2014 was broken rice. During colonial times, the French took cheap broken rice from Viet Nam to supply Senegal.

DOMESTIC RICE PRODUCTION

Table 3: Senegal cereals production - 2016

<table>
<thead>
<tr>
<th>Cereals (MMT)</th>
<th>Maize</th>
<th>Sorghum</th>
<th>Millet</th>
<th>Rice (milled)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.3</td>
<td>0.10</td>
<td>0.65</td>
<td>0.68</td>
<td>1.73</td>
</tr>
</tbody>
</table>

1 USDA, 2016 / IndexMundi

Table 4: Senegal rice production, 2012-2016 (MMT)

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.320</td>
<td>0.296</td>
<td>0.38</td>
<td>0.624</td>
<td>0.68</td>
<td>0.460</td>
</tr>
</tbody>
</table>

1 USDA, 2016 / IndexMundi

Production, area and yields
Rice is the second most important cereal crop after millet. Its production has expanded much more rapidly than other cereals – production doubled between 2014 to 2015, from 380,000 to 680,000 MT. Thanks to improved seed, increased fertilizer application, and introduction of better agronomic practices, rice yields have doubled to over 4 MT per ha. Government and corporations are both investing in new irrigated rice land in the Senegal River Valley.

1 FAO 2013 and USDA
Production of millet, the second most important cereal, has remained flat over the last five years. Most rice growers have just one ha or less. They are organized into collectives called “groupements” that are from 10 to 100 farm households. The farmers dry their rice on tarps on the ground. Post harvest losses are estimated around 20%. Of the rice surplus commercially available in the north, about 60% is sold locally. The remainder goes to Dakar and to Thies, the second largest city.

A rice growers association agrees to a paddy rice price during its annual meeting. The current paddy farm gate price is 125 CFA per kg (USD 208 / MT). Production cost is around 80 CFA per kg, according to one source.

Some “aggregators” working in the Senegal River Valley buy rice from small farmers and collectives to supply to mills. One of them began doing custom rice cutting with a combine harvester, taking paddy rice in payment. This operator now has eight combine harvesters financed with a bank credit.

There is a second rice-growing zone in the swampy, lowland Casemence region in the southwest. It is rain-fed, subsistence farming with little mechanization. Yields are only about one MT per ha, and the area requires purchased rice to meet local demands.

**Urban distribution**

UNACOIS, an association of the top 10 rice importers, has signed an agreement with the government in March 2015 to buy local rice and incorporate it into its distribution channels. The agreement has each of the importers buying a share of the local surplus rice equivalent to its share of imported rice. For example, if an importer has 20% market share, it must buy at the government fixed price 20% of the local stock.

The price paid by the importers for local rice will be based on a paddy cost of 125 CFA per kg. This includes costs of all inputs, power, water and transport. A representative of the importer organization says a more realistic cost for domestic rice would be 100 CFA per kg.

The member importers expect to receive 60,000 MT of whole milled rice for this season, processed by 12 or 13 modern mills. The importers will face some marketing difficulties. Urban Senegalese women consider local rice “pasty”, due to inadequate drying before milling.

**Government policy and programs**

The government agricultural bank called *Caisse Nationale de Credit Agricole* (CNCAS) extends crop financing to farmer groups and takes paddy rice in payment.

The Ministry of Agriculture announced a goal in 2013 of attaining self-sufficiency in rice by 2017 through the production of 1.6 MMT of paddy, equivalent to 1.08 MMT of quality white rice. Although rice production has grown substantially in recent years, 2016 reported production was still only 40% of the country’s total rice needs. It is unlikely the country will reach the goal of self-sufficiency by 2017 despite recent production successes.

The main avenue to reach this target is opening new irrigated land for rice cultivation. The agency in charge under the Ministry of Agriculture is SAED (*Société Nationale d'Aménagement*...
et d'Exploitation des Terres du Delta, du Fleuve Sénégal et des vallées du fleuve Sénégal). Its website shows support from numerous international organizations and donors including AfricaRice, World Bank, Islamic Development Bank, JICA, European Union and others.

**International support**

USAID has a project called Feed the Future (also called “Naatal Mbay” in the Wolof language) that attempts to increase the quantity and improve the quality of domestic rice. Their target is to reach 1 MMT of domestic milled rice annually, based on two crops per year.

SAED has built 10 storages of 500 MT capacity each with Spanish support.

**IMPORTED RICE INDUSTRY**

**Table 5: Annual rice import volumes, 2012-2016 (MMT)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rice</td>
<td>1.000</td>
<td>1.100</td>
<td>1.200</td>
<td>0.950</td>
<td>0.950</td>
<td>1.04</td>
</tr>
</tbody>
</table>

1 USDA, 2016 / IndexMundi

Senegal has a long tradition of consuming imported rice, going back to the colonial period when broken rice from French Indochina (Viet Nam) was introduced as a low cost food for the urban population.

Total rice import volumes in 2016 were 0.950 MMT, 8% lower than the five-year average of 1.04 MMT. Increased availability of domestic rice explains the lack of increases in imports over the last five years despite low international prices.

Wheat imports and consumption have increased 39% in the four years since 2011. This reflects the growth in the urban population, higher incomes, and increasing popularity of bread as a convenient food.

**Rice origins**

According to UN Comtrade, the top rice origins are India (62%) and Thailand (22%), Brazil (4.5%) and Antigua and Barbuda (4.4%). Nineteen other countries are reported to supply the remaining 7.8% of imported rice. Interviews with importer sources however indicated that South America is the most common origin for the 60% of imports that are 100% broken kernels, though 100% broken kernels also come from Thailand and less frequently from Egypt and the US. Rice in containers comes most often from India. The strong presence of Louis Dreyfus (LD) Company in rice milling in Brazil explains the importance of Brazil as an origin.

**Mode of imports**

Bulk shipments in vessels up to 30,000 MT make up most rice imported to the port of Dakar. Almost all 100% broken rice arrives in bulk vessels, amounting to at least 500,000 MT per year.

Bagging is done at discharge at the port. The largest importers may own bagging machines while the majority of them pay for bagging services at port from companies like Nectar International, UK. An average vessel with four holds requires four bagging machines for unloading.

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Rice importers
Eleven large importers buy about 800,000 MT of rice per year, or about 80% of total rice imports. Many smaller companies import rice the remaining 20% of imports in containers.

Two companies, Tiger Denrees Senegal and Comptoir Commercial Mandiaye Mandiaye (CCMM) have a combined 50% share of imported rice. These two companies have increased their volumes in recent years.

Louis Dreyfus (LD) Company has had a 23% market share over the last three years, averaging 200,000 MT per year despite holding an import permit for 400,000 MT of rice.

As discussed above, rice importers have also begun commercializing local rice via its association, UNACOIS. UNACOIS has gathered five years of data on rice imports by company to allocate quantities for domestic rice purchase.

Rice importers are diversifying into rice farming as well as milling. LD Company is planning to work with a big French company that has developed 2,600 ha of rice land in the north and recently built the largest mill. Other rice importers will invest in land as well.

Table 6: Major rice importing companies in Senegal (partial list)

<table>
<thead>
<tr>
<th>Company</th>
<th>Headquarters</th>
<th>Import share (MT)</th>
<th>Local milling capacity?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comptoir Commercial Mandiaye Mandiaye (CCMM)</td>
<td>Dakar</td>
<td>200,000</td>
<td>Planned</td>
</tr>
<tr>
<td>Tiger Denrees</td>
<td>Dakar</td>
<td>200,000</td>
<td>No</td>
</tr>
<tr>
<td>LD Company</td>
<td>Netherlands</td>
<td>200,000</td>
<td>Planned</td>
</tr>
<tr>
<td>Societe Senegalaise de Marchandises Alimentaires (Subsidiary of Olam Group)</td>
<td>Singapore</td>
<td>Unknown</td>
<td>No</td>
</tr>
<tr>
<td>Compagnie d'Investissements Céréaliers</td>
<td>Switzerland</td>
<td>Unknown</td>
<td>No</td>
</tr>
</tbody>
</table>

*UNACOIS interview

Imported rice storage
There is 40,000 m² of warehouse capacity at the port of Dakar for imported rice and other commodities. Collateral management companies control the rice stored at the port on behalf of banks and large exporters. Volumes stored at the port any time could be in the range of 100,000 to 200,000 MT.

GOVERNMENT RICE POLICIES AND PROGRAMS
Official government policy is to reduce rice imports while promoting domestic production. In the past, government used high import tariffs to protect domestic producers. However this only resulted in large volumes, up to 100,000 MT per year, of rice smuggled from Gambia. Import duties have been lowered and smuggling has decreased. Now government works with rice importers to get them to invest in the domestic rice value chain, using granting of import licenses as the main leverage.

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4 Logistics Capacity Assessment. 2016. Additional Port of Dakar Information.
http://dlca.logcluster.org/download/attachments/853704/Additional%20Port%20of%20Dakar%20Information.docx?version=1&modificationDate=1376495778000&api=v2
The government agricultural bank called *Caisse Nationale de Credit Agricole* (CNCAS) extends crop financing to farmer groups and takes paddy rice in payment.

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**RICE MILLING**

*Village milling*

About 30% of the paddy rice produced by smallholders in the Senegal River Valley is still milled at the village level for self-consumption or for local sale. Nationally, the estimate of village-milled rice could be 60%. The number of husking mills will continue to decline as farmers sell more of their surplus to larger mills that produce higher quality rice.

An estimated 420 small-scale millers in the Senegal River Valley produce rice for commercial sale, and another 159 small mills (not including manual mills) in Casamance. However it is not clear how many of these could actually be considered village mills and how many would fall under the semi-industrial mills below.

*Semi-industrial milling*

There is a middle tier of medium-sized mills with capacity of 5-10 MT paddy per day. They may still process about 30% of all rice in the north.

*Industrial milling*

Now 15 to 20 industrial rice millers are all located in the Senegal River Valley (SRV) in the north of the country. Capacity has grown quickly, as a study in 2014 found only eight large rice millers. They have milling capacity from 4 MT of paddy per hour upwards. One source says that such larger mills now process only 40% of the paddy rice production in the north. From the field data gathered, FFI also estimates that the total existing milling capacity in the country could be 250,000 MT, or 38% of the total milled rice produced in the country (using USDA 2016 estimates). At the rate new large mills are being built or expanded, that share could rise to 90% within five years.

For the last five years investment in large modern mills has been accelerating. A French company with investments in rice production (2,600 ha tract of irrigated rice land) has recently

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5 Soullier Guillaume, Moustier Paule. Does Modernization Of The Rice Value Chains In Senegal Illustrate A Move Toward The Asian Quiet Revolution? Centre de coopération internationale en recherche agronomique pour le développement (CIRAD), 2015.
built a mill with annual paddy processing capacity of 280,000 MT (~40 MT/hr), surpassing the 100,000 MT per year (~14 MT/hr) of the Vital Mill built in 2011 and recently expanded\(^6\).

Three of the leading rice importers have built their own rice mills in the north with minimum paddy rice capacity of 7 MT per hour. Their average investment is 500 million CFA for a mill and storage.

### Table 7: Industrial and semi-industrial rice millers in Senegal (partial list)

<table>
<thead>
<tr>
<th>Company</th>
<th>Parent company</th>
<th>Capacity (paddy)</th>
<th>Farm</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compagnie Agricole de Saint-Louis du Sénégal SA (CASL)</td>
<td>Arthur Straight Investissement, Paris</td>
<td>260,000 MT/yr (~40 MT/hr)</td>
<td>2,600 ha irrigated rice farm</td>
<td>Largest mill Partnership with LD Company</td>
</tr>
<tr>
<td>Vital, Saint-Louis</td>
<td>Malick Seck, Owner, Bamako</td>
<td>100,000 MT/yr (~13 MT/hr)</td>
<td>No</td>
<td>2nd largest mill Financed partly by USAID</td>
</tr>
<tr>
<td>Sénégalaise des Filières Agricoles (SFA)</td>
<td>Durabilis Group, Belgium</td>
<td>12,000 MT/yr (1-2 MT/hr)</td>
<td>No</td>
<td>Known as Terral Rice</td>
</tr>
<tr>
<td>Coumba Nor Thiam Susarl (CNT), Rosso</td>
<td>Large rice cooperative</td>
<td>Capacity of mill unknown</td>
<td>No</td>
<td>Supplies WFP. Supported by USAID</td>
</tr>
</tbody>
</table>

Source: Industry interviews

There is a shortage of paddy and milled rice storage capacity in the main production zone along the Senegal River Valley where the harvest has expanded rapidly. One miller estimates there is 50,000 MT of paddy rice storage, but 100,000 MT is needed. Farmers just pile their paddy rice on tarps outdoors to dry before bagging it and taking it to husking mills.

USAID has financed six model warehouses in the north of Senegal that are part of an International Finance Corporation (IFC) / World Bank project to establish a warehouse receipts system that targets storage of paddy and rice. IFC is helping to develop the legal framework and sensitizing people. It is a three-year program that includes creating a legal and regulatory framework and training and awareness building among all stakeholders. Ministry of Commerce is IFC’s government partner for the project.

Banks provide loans to government for storage of rice.

**WHOLESALE AND RETAIL TRADE**

**Wholesale**

Distribution networks for imported rice in Dakar and other cities are highly developed. However domestic rice trading networks that bring rice from the commercial production zone in the north to Dakar have only been taking shape for the last several years.

\(^6\) Estimated assuming that 100% utilization of capacity would be running 24/hr, 300 days a week
Retail
Public markets in low-income districts and small shops and supermarkets in higher income areas are the most common sales points for rice. The majority of rice sales in urban areas are in 25 kg bags. Vendors in public markets still sell much rice by the scoop to lower income consumers. A high proportion of the poorest population may buy a scoop or two of rice daily. The average cost of 1 kg of rice between 2014-2016 in Senegal was 925 CFA (USD 1.58), but this may be an overestimation – in 2012 the Government of Senegal set maximum price ceilings of 280-300 CFA for non-fragrant rice and 435-450 CFA for fragrant rice (lower end of the range for Dakar region).

WORLD FOOD PROGRAMME
WFP is aiming to increase acceleration of local food purchasing. WFP has a target of purchasing 10% to 20% of its food requirement from small farmers. In the case of Senegal, this can include purchasing of rice from local milling companies in the north who buy from small rice farmers.

The main local rice supplier to WFP has been Coumba Nor Thiam (CNT). Supported by USAID, it is one of the largest rice production facilities in the Senegal River Valley CNT is part of the same USAID Economic Growth Project that has been training 12,000 farmers in rice farming.

WFP’s regional office in Dakar has responsibility for 19 countries in west and central Africa. WFP has three levels of procurement: centrally in Rome, regionally and local purchasing by country offices. Rice purchasing for West African countries is done at all three levels.

Rice is the main food commodity distributed by WFP in most West African countries. Some sorghum is purchased locally in Mali and Niger. Maize and maize meal distribution has been reduced severely since 2013 in favor of rice due to testing that revealed high levels of aflatoxins.

During the response to the Ebola crisis, 90% of the rice was imported due to the need for rapid delivery of large volumes with acceptable quality.

WFP Rome has a standing arrangement with the Singapore trading office of LD Company that provides much flexibility in rice purchasing for West Africa. LD Company guarantees the availability in Dakar of 2,000 MT of imported rice per month. Prices are fixed at 6-month intervals. When rice is needed WFP merely exercises its option. There is no obligation for final delivery. WFP Dakar also procures rice supply for Mali, Mauritania, and Gambia.

REGIONAL TRADE
Senegal is a corridor for rice and other commodities imported to landlocked Mali, which has a system of import tariffs and licenses for rice to protect its large domestic rice industry. This results in an unknown amount of illegal cross-border trade in rice from Senegal to Mali. Much of this trade may be limited to supply the westernmost areas of Mali, since most of the country is almost self-sufficient in rice. Total cross-border trade volumes could be 20,000 to 30,000 MT.

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8 590 CFA francs =1 USD. November 2, 2016. https://www.oanda.com/currency/converter/
When import tariffs on rice were as high as 70% there was up to 100,000 MT of rice smuggled from Gambia into Senegal. Some cross border trade still takes place but the volumes may now be only 20,000 MT per year.

REGULATORY MONITORING
Government exercises control over rice imports through the granting of import licenses. It is now using this leverage to require major rice importers to bring local domestic surpluses into their distribution channels even though it has a higher cost than imported rice.

The Ministry of Commerce, Informal Sector, Consumer Affairs, Promotion of Local Products and Small-Medium-Enterprises (SMEs) (Ministère du Commerce, du Secteur informel, de la Consommation, de la Promotion des produits locaux et des PME) is the regulatory agency that is responsible for product manufacturing, importation, and exportation. The Directorate of Domestic Trade (Direction du Commerce Interior) under the Ministry of Trade is responsible for enforcing food safety regulations, including fortification\textsuperscript{11}.

RICE FORTIFICATION – SWOT ANALYSIS

Strengths
- At 193 g/c/d average consumption, rice is a staple cereal grain throughout Senegal.
- Imported rice comprises at least 60% of current rice consumption. The urban population consumes at least 80% of imported rice.
- Imported rice is 80% in bulk vessels and bagged at the port, which would facilitate fortification at destination.
- For domestically grown rice, there is a strong trend toward larger commercial mills.
- Several potential fortification partners are based regionally in Senegal.
- An existing fortification program includes wheat flour and vegetable oil.

Weaknesses
- Around 60% of local rice is husked in small village mills where fortification is not feasible.
- Although domestic industrial milling is growing, it still remains that the rural population is consuming village-milled rice that cannot be fortified in the immediate future.

Opportunities
- Lessons learned from the existing wheat flour and oil fortification program could inform the inclusion of rice into the national program.

Threats
- Government may resist any policy that could be perceived as encouraging market acceptance of imported rice.
- Commercial millers are focusing on improving quality in other areas to gain market share.

Appendix 1. RICE INDUSTRY CONTACTS

SENEGAL RICE CONTACTS

Company
Compagnie Agricole de Saint-Louis du Sénégal SA
BP 902 - Pointe Nord de l'Ile
Saint Louis du Sénégal
Office +221 33 961 09 61
Arthur Straight Investissement SAS
38, rue Copernic - 75116
Paris
Office +33 1 40 67 06 32

Company
SFA (Sénégalaise des Filières Agricoles)/Durabilis Group/ Terral Rice
Saint-Louis, Senegal
www.durabilis.eu
Kevin Tork, managing director
Mobile +221 76 477 66 07
kevin@durabilis.eu

Company
Vital Mill
Saint Louis, Senegal
Malick Seck, managing director / owner
Mobile +221 77 644 66 07

Company
Coumba Nor Thiam Susarl (CNT)
Thiagar BP 4 Rosso,
Sénégal
Office +221 33 963 63 01 - 77 639 11 87
Mr. Diop, Director of Operations
Mobile +221 77 9314828 or +221 77 644 3998 or +221 77 119 1601
Rice growers cooperative in north with mill.
Funded by USAID. Sells to WFP.

Organization
UNACOIS jappo
Avenue Cheikh Ahmadou Bamba
Face Place de l’Obelisque
B.P.: 3698 Dakar – Peytavin
www.unacois.sn (not working)

Office: +221 33 889 29 70 or +221 22 889 29 71 (direct)
Date of meeting: Wednesday, Sept. 30, 2015
Participating
Ousmane Sy Ndiaye, Director
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Company
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Dakar, Senegal
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Franck Chaubert, general manager
Mobile +221 76 450 00 04
Laura Drame, Executive Commodities
Mobile + 221 77 525 04 87
Office direct + 221 33 834 25 70
laura.drame@ldcom.com
Eric Bourgi, Rice trader
eric.bourgi@ldcom.com

Organization
SAED
Societe Nationale d'Amenagement et d'Exploitation des Terres du Delta, du Fleuve Sénégal et des Vallées du Fleuve Sénégal
RN2 - Route de Rosso
Ngalléé
BP 74 Saint-Louis, Senegal
www.saed.sn
Office +221 33 938 22 00
saed@orange.sn

Organization
CNCAS- Caisse Nationale de Credit Agricole
Saint-Louis, Senegal

Organization
Helen Keller International
Toundoup Rya Lot 122, Route de
**Organization**

USAID / Engility / Naafal Mbaye
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**Date of meeting**: September 28, 2015

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